



Records Management Tip

Records management advice prepared for GNWT records professionals by the Records Management Unit, PWS

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Records Centre Series

The Other Close Date Field

Changes to the Box Inventory Form in 2005

Public Works and Services recently modified the forms that departments use to transfer boxes into storage in the Records Centre and retrieve files and boxes from storage. One of the changes included the addition of a field called **other close date**.

The Records Centre series gives you information on how to access the Records Centre's storage, retrieval, and disposition services.

BOX INVENTORY FORM				Dept. Reference #	
Location		Box Notes / Comments			
Originals (Masters) / Copies	Box Date (mm/yyyy)			Box Retent	
	From	To	Other Close	A	SA
Location of Record	File Date (mm/yyyy)			File Retent	
	From	To	Other Close	A	SA

The Other Close Date Field

In the GNWT's ARCS/ORCS¹ system, the retention periods and disposition dates are calculated based on the closed date of a file. The closed date of a file is usually the date of the last document on the file. However, from time to time departments will want to use a different date to calculate the retention and disposition. This most often happens with files that close based on an event, such as superseded or obsolete (S/O).

For example, imagine that you opened a policy file in 1995. The date of the last document on the file is 1996. The policy remained in effect until 2005. The retention schedule said that you were supposed to keep the file open and active until it was superseded or became obsolete. If you use 1996 as the close date, you would probably dispose of the file too soon.

¹ ARCS stands for Administrative Records Classification System. ORCS stands for Operational Records Classification System.

To solve this problem, PWS added the other close field. Use this field when you want to use a date other than the close date to calculate retention and disposition. Always enter the S/O date in this field for files that have an S/O retention trigger in the retention schedule, even if the to date and the S/O date are the same.

For information on retention triggers, see Tips #19 and #21.

The Other Close Field in the MS Excel version of the Form

The MS Excel version of the Box Inventory Form is designed to calculate the disposition date of each file based on the information that you enter into the form. It does this by adding the active (A) and semi-active (SA) periods to the file closed date or the other closed date fields.

Use the Other Close field if you want to calculate the retention and disposition based on a date other than the file closed date. Always use this field if the file's retention schedule has an S/O retention trigger.

In order to calculate the disposition date properly, the Excel form must be filled out correctly:

- All dates must be entered in the mm/yyyy format. For example, May 2005 should be entered as 05/2005. You can type in the day, month, and year, but only the month and year will be displayed on the form.
- The active (A) column will only accept the following formats:
 - A number
 - S/O
 - SO
 - SO+###. Note that there is no slash between the S and the O, and that there are no spaces around the plus (+) sign.
 - FY+###
 - CY+###
- The semi-active (SA) column will only accept the following formats:
 - A number
 - Nil